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This paper describes the methods engaged in by an internal evaluation unit within a large school district to transition program staff from participating in a formal program evaluation to continuing the responsibility of program monitoring once an evaluation ends. Formal multiyear program evaluations can provide program managers and staff with detailed ongoing feedback about programs throughout the duration of the evaluation, but once evaluations end, program staff may find they lack the skills or motivation to continue the efforts on their own. By developing the Quality Programs Assurance System (QPAS), a shared accountability system, and by using a participatory approach to evaluation that involves school-based staff in the process of collecting and interpreting data, the evaluators strive to facilitate a smooth transition from evaluation to program monitoring for program staff, as well as for high-level decision makers that use evaluation data. (Contains 1 table and 10 references.) (Author/SLD)

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What do we do now that the evaluation is over?

Methods for transitioning the responsibility of evaluation to program staff

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Paper Presented at the Annual Meeting of the

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Abstract

The purpose of this paper is to describe the methods engaged in by an internal evaluation unit within a large school district to transition program staff from participating in a formal program evaluation to continuing the responsibility of program monitoring once an evaluation ends. Formal multi-year program evaluations can provide program managers and staff with detailed ongoing feedback about programs throughout the duration of the evaluations, but once the evaluations end, program staff may find they lack the skills or motivation to continue the efforts on their own. By developing the Quality Programs Assurance System (QPAS), a shared accountability system, and by using a participatory approach to evaluation that involves school-based staff in the process of collecting and interpreting data, the evaluators strive to facilitate a smooth transition from evaluation to program monitoring for program staff, as well as for high-level decision makers that use evaluation data.

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What do we do now that the evaluation is over?

Introduction

With the current climate of accountability and budget cuts in school systems, the need for formal program evaluation is great. Program evaluation is valuable for high-level administrators in making decisions about program expansion and funding and for program and school staff in making ongoing program improvements. Within a large school system in Virginia, an internal evaluation unit designs and implements multi-year evaluations with these audiences and purposes in mind. Program evaluation is situated within the Quality Programs Assurance System (QPAS), a shared accountability system consisting of three levels, documentation, review and evaluation. QPAS gives program staff responsibility for ongoing program documentation and biennial review reporting. Evaluators are responsible for program evaluations and assisting program managers in program monitoring. As part of QPAS, evaluators provide annual interim reports during the course of the evaluation and a final report at the end, all designed to provide information to help in decision making. However, at some point, the formal evaluation must end. All of the evaluation activities that have been handled by professionally trained evaluators now need modifications so that program staff have primary responsibility for documentation and review with the assistance of an evaluator. This paper illustrates the methods used to transition from an evaluation of an early childhood program to program documentation and review.

History of program and evaluation

Beginning in 1998, the school system began exploring implementation of a kindergarten through second grade early childhood initiative. This program consisted of eight major components, including learning community options, clear standards and benchmarks, school-based professional development, team teaching, full day kindergarten, family-school connections, challenging, complex, and connected curriculum, and quality early childhood practices (consisting of ten elements). The program was designed to provide elementary teaching staff with staff development opportunities and additional resources (e.g., funding for instructional assistants in full day kindergarten classrooms) for implementing the eight components to prepare students academically. The intent of the initiative was to coordinate the use of the

entire set of components as research-based enhancements to the existing academic program. Elementary schools were selected to participate in the program after submitting a readiness proposal to and being interviewed by the central office of early childhood that held responsibility for program management. Six schools began implementing the program and participated in a formal program evaluation during the 1998-1999 school year. One additional group (Phase II) of six schools implemented the program and participated in a formal evaluation beginning in 1999, but this paper focuses only on the first group (Phase I) of schools.

The school system's internal office of program evaluation had responsibility for the formal program evaluation, which was lead by one staff evaluation specialist. An evaluation advisory team of stakeholders involving school staff, central office staff, parents, and university experts in early childhood education provided input into and feedback on the evaluation design. The four-year evaluation examined training and staff development, program implementation, student achievement, and costs and resources. The evaluation involved extensive data collection including teacher surveys, observations, parent surveys, principal interviews, teacher focus groups, and student achievement, including state and district mandated testing, as well as additional testing required solely for the evaluation. At the end of the first year of the evaluation, the report of findings focused primarily on a program level summary (looking across the six schools) to high-level decision-makers (i.e., school board, superintendent, and department superintendents) and school principals. However, it became clear that an interim evaluation report focusing only at the program level, while useful to high level decision makers, was not specific enough for school staff with regard to helping them make program improvements at the school level. The lead evaluator sought input from the advisory team, program, and school staff to determine how evaluation reporting would be most helpful to school staff and the central office early childhood staff tasked with program management (Fetterman, 1996). The first step was to create reports that summarized evaluation data at the school level. While this improved the level of access to evaluation data, not all school principals and teachers used the information to inform program improvement or understanding.

During each of the last two years of the evaluation, the lead evaluator held workshops for school staff to review, analyze, and discuss their evaluation data. Group activities and worksheets facilitated increased utilization of the evaluation results by principals, teachers, and central office staff. The activities and worksheets gave staff a structured process for reviewing data and discussing findings with the goal of making plans for program improvement. Some examples of increased utilization of the evaluation results included, school staff participants inviting the lead evaluator back to the school site for an on-site workshop or evaluation data presentation with all teaching staff or the school planning committee, a school principal created her own data worksheets using upper elementary achievement data for non-program upper elementary staff, and a teacher wrote an article for the parent newsletter informing parents about the evaluation results she learned in the workshop. Evaluation forms from workshop participants indicated that the large majority of participants planned to use the evaluation data for school improvement planning, to share data with other staff, and to use data to identify program strengths and weaknesses (Greene, 1988a, 1988b).

Approximately three staff of the early childhood office, a director, specialist, and curriculum resource teacher, had responsibility for program management, including providing the training and staff development, as well as for overseeing the distribution of funds to schools for program implementation. The lead evaluator maintained frequent communication with these staff regarding the evaluation. The director sat on the evaluation advisory team and the specialist and curriculum resource teacher worked closely with the evaluator during reporting times, helping to provide an understanding of day-to-day functioning of the program. As a result, the early childhood staff came to depend on the evaluation results to obtain feedback on their work with the program and to make their own improvements with central office services to school staff. In addition, the early childhood staff attended the evaluation data interpretation workshops as participants and also served as workshop facilitators in the final year of the report. In short, the lead evaluator's participatory approach to the evaluation helped facilitate not only school staff members' use of evaluation data, but also facilitated the early childhood program managers'

use of evaluation data and increased valuing of data to perform job functions (Fetterman, 1996; Greene, 1988a, 1988b).

Quality Programs Assurance System (QPAS)

At the same time this early childhood program evaluation occurred, and in response to local and national interest in educational program accountability, the school system began developing a shared accountability system, the Quality Programs Assurance System (QPAS). QPAS is a system of shared accountability for educational programs consisting of three levels: documentation, review and evaluation. In QPAS, the responsibility for program accountability is shared across departments within the school system, including the people who manage educational programs as well as trained internal program evaluators. Program managers are responsible for two levels, ongoing program documentation and for completing formal biennial review reports. Program evaluators are responsible for the third and highest level, producing annual interim evaluation reports during the course of the evaluation and a final report at the conclusion of the evaluation. All three levels of QPAS must address a specific set of data elements about programs (e.g., purpose, goals, and objectives; groups targeted for impact; implementation; impact, and budget). All review and evaluation reports are designed to provide information to aid in decision making, both at the program and the system level.

QPAS was developed as part of the school system's larger commitment to accountability, for students, schools, staff, and programs. In keeping with the current nationwide commitment to accountability as manifested by the No Child Left Behind Act (2001), the School Board became interested in evaluation information for all instructional programs to help facilitate informed decision-making. QPAS became district policy in July 2000, with new and current programs phased in over the next three years. The policy represented the institutionalizing of evaluation in the school system (Sanders, 2002). In fall 2002, the first set of QPAS biennial review reports were completed and presented to the School Board and then made available to the public via the internet.

Developing QPAS was the responsibility of the internal office of program evaluation, and involved several steps (Coyne Cassata & Sockwell, 2001). The first step was to develop a system that

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included multiple reporting levels that could result in shared accountability. The school board and high-level administrators in the school system were then involved in determining the set of data elements that were to be included at all levels of QPAS. In addition, the high-level administrators, including the superintendent, determined the list of programs that would become part of QPAS over time. All programs that were currently undergoing formal evaluation were placed into the initial group of QPAS programs. Once the group of programs was determined, the internal office of program evaluation had responsibility for training the designated program managers in the QPAS data elements and reporting requirements. Each year, feedback is gathered from program managers and high-level administrators about QPAS so that improvements can be made to the process.

While a program is undergoing formal evaluation, the program evaluators work with the program managers. During that time, the program managers are not responsible for completing QPAS review reports, since annual interim evaluation reports are completed. However, at some point, the formal evaluation comes to an end. With the end of the evaluation comes the transition of QPAS responsibilities from the program evaluator to the program managers. Many of the evaluation activities that have been handled by professionally trained evaluators now may need modifications so that program staff can handle the primary responsibility for documentation and review, with the assistance of an evaluator.

Once the transition takes place, program managers have responsibility for maintaining and providing accurate information about their programs. One of the most critical components of QPAS is the requirement for clearly defined goals and objectives for all programs that can be understood by decision-makers as well as the public (Coyne Cassata, 2003; Schilder, 1997). QPAS incorporates the notions of results- or outcomes-based accountability systems (Horsch, 1996; Schilder, 1997) but also requires that data be provided about program implementation, training and staff development, etc., to facilitate program improvement decisions (Coyne Cassata, 2003). Since program evaluations require the same types of data, program evaluation reports provide program managers with historical information about the program as well as models for data collection and analytical approaches.

To enable the success of all program managers in meeting the requirements of QPAS, program evaluators provide ongoing training to program managers related to the data elements and reporting requirements. This training has been both formal and informal in nature. Formal training was provided at the outset of the implementation of QPAS, with a specific focus on the data elements and on writing measurable goals and objectives. Those program managers whose programs were currently undergoing evaluation were included in these training sessions. Each year, additional formal training has been provided addressing the reporting requirements. Informal training and technical assistance are provided by program evaluators, who are assigned groups of program managers to assist, including the program managers of any programs they are evaluating.

Program managers have indicated that the training and assistance have been very valuable in helping them understand the requirements of QPAS as well as how to collect and use appropriate data for program-level decision making (Coyne Cassata, 2003). One goal of QPAS is that over time, program managers will develop an increased capacity and comfort with monitoring and evaluating their own programs so that they can use the information to make program improvement decisions (King, 2002; Sanders, 2001). In many cases, program managers whose programs have been involved in formal evaluations have been working closely with program evaluators as the evaluation reports are developed and presented. The challenge comes in shifting the responsibility and ownership of data collection and reporting from the evaluator to the program manager.

Once an evaluation ends (or a new program is phased into QPAS), a program manager has two years before the first review report is due. During those two years, the program manager is required to update goals and objectives, collect and maintain documentation data, and analyze the progress of the program. The evaluator provides technical assistance to the program manager, in the form of helping to clarify goals and objectives, working through data collection and analysis plans, and providing feedback on report drafts. The remainder of this paper describes the transition process from evaluation to review for the early childhood initiative discussed earlier.

Convergence of QPAS and the Program Evaluation

The formal evaluation of the early childhood initiative concluded at the end of the 2002-2003 school year. At that point, the responsibility for documentation and review transitioned to the program managers. Table 1 details the evaluation and reporting timelines. Several factors enabled the transition of this early childhood initiative from program evaluation to documentation and review, including evaluator involvement, the completion of a practice report, and formal transition meetings and activities.

Evaluator Involvement

The office of program evaluation staff person with lead responsibilities for implementing and providing training for QPAS is herself an evaluator and worked closely with the lead evaluator for the early childhood initiative. Both evaluators worked in the same internal evaluation office and shared the same participatory and utilization-focused orientation to evaluation. The lead evaluator for the early childhood program was trained in the requirements of QPAS and valued the notion of shared accountability. In addition, the lead evaluator was responsible for providing technical assistance to a small group of other QPAS programs, especially as program managers completed their first review reports. The QPAS evaluator also served as a member of the early childhood initiative evaluation advisory team and worked with the lead evaluator to provide technical assistance to program staff. The two evaluators proactively engaged in discussion about the transition of this particular program from evaluation to documentation and review. This program was among the first to undergo such a transition.

Practice Report

The first QPAS review reports were completed in the fall of 2002 by the first group of programs identified for QPAS. The decision was made that those programs currently undergoing evaluation should also complete practice review reports, even though the reports were not required by QPAS, and since annual evaluation reports were already completed. These practice reports were developed for internal purposes, to give decision-makers a sense of the program and to give the program managers practice in articulating goals and objectives and completing the review report itself. The lead evaluator worked closely with the early childhood program managers as they articulated their goals and objectives and

developed their practice report. The early childhood program managers also used the evaluation reports as a framework as they developed their practice report and it will serve as a starting point when the early childhood program managers complete their first actual review report. By engaging in this exercise, the early childhood program managers were able to facilitate their understanding of the QPAS requirements and their ownership of the process.

Formal Transition Meetings and Activities

The formal transition from evaluation to documentation and review involved a series of culminating events and formal meetings between evaluators and program managers. At these formal meetings, the evaluators engaged the program managers in a series of discussions and activities to help them take ownership of their program accountability responsibilities. One major role of the evaluators was to revisit the program goals and objectives with the program managers and help them make necessary modifications. In addition, the evaluators brainstormed with the program managers about what data are critical to collect and in what manner. The specific focus of each meeting is detailed below. The culminating evaluation events occurred in the fall of 2002, which followed the last school year of the evaluation (2001-2002). These lead to a series of transition meetings, which helped to shift the responsibility of the evaluation from the evaluator to the program staff.

Culminating Evaluation Events

During the fall of 2002, the lead evaluator wrote the final evaluation report for high-level decision makers as well as the last series of school level evaluation reports for school staff and early childhood central office staff. During report writing, the lead evaluator communicated with the central office program managers to obtain information about program costs and for clarification and triangulation of information on a variety of program issues. These communications reminded the early childhood program managers that the evaluation was coming to an end. The early childhood program managers were aware that audiences such as the school board and superintendent would also be informed of the fact that the evaluation was ending.

The lead evaluator held the final evaluation data utilization workshop at which the central office early childhood staff, as well as the lead evaluator, served as facilitators. Here the early childhood program managers saw how much school staff valued the workshop opportunity to review their own evaluation data and how they used it to discuss strategies as teacher and administrative teams. During the workshop, school staff members asked if the workshop opportunity would continue for them once the evaluation was over. Early childhood staff began considering what role they could take in holding workshops in the coming years when the evaluation was over.

The early childhood program managers attended the February 2003 school board meeting at which the final evaluation report was presented and ideas about program expansion were discussed. It was clear that there was potential for program expansion given the generally positive evaluation findings. The school board members expressed appreciation that QPAS would continue to provide evaluative information to them about the program and to help keep up with program functioning in future years. These series of events helped reaffirm to the early childhood program managers that ongoing evaluation information was helpful for and valued by many different audiences within the school system and QPAS would be the way to continue it. In spring of 2003, the lead evaluator happened to stop by the early childhood office to say hello to program staff and they requested a meeting with the lead evaluator to discuss QPAS and their role in accomplishing it. This sparked the next series of formal evaluation transition meetings.

Transition Meetings

The evaluation transition meetings began on May 28, 2003. The lead evaluator met with the specialist and curriculum resource teacher to review the components of QPAS, their plan for program documentation and review, and what needed to be added or revised. They discussed how their own department's recent reorganization would impact their work on QPAS. Among their concerns was making a plan and system for maintaining information on how schools spent program money on training and staff development. This central office provided program schools money at the beginning of the year to spend on training and staff development as it fit the needs of the individual schools, but schools did not

necessarily maintain accounting spreadsheets or clear descriptions of sessions in which staff participated. Additionally, they discussed how they could continue to collect data on program implementation (e.g., teacher surveys, classroom observations, principal ratings, etc.) that had been traditionally collected by the office of program evaluation. Finally, there would be a staffing change, with the responsibility for QPAS going to the director and curriculum resource teacher, while the specialist left her position to reenter the classroom as a teacher.

At the curriculum resource teacher's request, the next transition meeting occurred on July 10, 2003 with the evaluator, director and curriculum resource teacher. At this meeting, the director spent some time reviewing the larger political ramifications of QPAS, changes in her department's organization, and asked about the details of implementing QPAS. The evaluator came prepared to help them discuss specific program goals and objectives, as well as discuss options for collecting data that would help them determine if they were meeting their goals and objectives. After a few objectives were discussed, it was decided that it would be helpful to first have a QPAS review training for the director and curriculum resource teacher, since the teacher was relatively new to QPAS and would have day-to-day responsibilities for QPAS. Once the training took place, it would be easier to move forward with plans for redefining the goals, objectives, and data collection needs since everyone would have a clearer understanding of the purpose and requirements of QPAS. During this meeting, the evaluator and program managers agreed that four additional transition meetings should be set, the QPAS training session, two work meetings for revising or building the data collection plan and instruments, and a meeting with the program schools' principals to explain their role in the transition from evaluation to QPAS program documentation and review.

The lead and QPAS evaluators had a formal transition meeting on July 30, 2003. The purpose of this meeting was for the lead evaluator to share the outcomes of the earlier transition meetings with the QPAS evaluator. In addition, they determined it would be best for both of them to continue meeting with the program managers to ensure a smooth transition. At this meeting, preliminary plans were made for the four upcoming transition meetings.

The training of the director and curriculum resource teacher took place on July 31, 2003. The director attended this training as well, although she had already participated in formal QPAS training at an earlier time when she was responsible for managing a different program. The QPAS evaluator conducted the training, although the lead evaluator observed and participated in discussion. This training was one-on-one and focused specifically on the QPAS requirements for this early childhood initiative. It became apparent to the evaluators that the curriculum resource teacher was already somewhat familiar with the expectations of QPAS, having seen some of the training materials, and having been involved in the development of the practice review report. At the end of the training, plans for the first work meeting were set. The director and curriculum resource teacher, serving together as program managers, planned to revise the goals and objectives that had been included in the practice report and the evaluators planned to pull together data collection instruments that had been used in the evaluation that could be used for QPAS data collection.

The first work meeting occurred on August 8, 2003. At that meeting, the director and curriculum resource teacher shared the final draft of the practice review report that had been completed the prior fall. Using that document, the evaluators walked the program staff through the goals and objectives to rephrase them in light of the evaluation being completed. During this meeting, the evaluators stressed the importance of keeping the scope of the goals and objectives and data collection manageable so that the process would not be too overwhelming. The evaluators asked the director and curriculum resource teacher what program implementation information they needed most and how they thought they could collect the information. The evaluators proposed alternative ways to collect the information, from modified versions of instruments used in the evaluation, to online data collection instruments. The director and curriculum research teacher talked about wanting to gather information from the principals of the schools involved in the initiative and considered proposing a series of meetings throughout the school year, and scheduled the first meeting as a principals' coffee.

The second work meeting occurred on September 22, 2003. At this point the QPAS evaluator now had sole responsibility for concluding the formal evaluation of the early childhood program since the

lead evaluator had left the school system. The QPAS evaluator met with program managers to share and discuss specific instruments that the program managers could use to collect program implementation information, including an online survey instrument. At this meeting, planning began for the principals' coffee. The program managers asked the evaluator to provide a brief overview of QPAS requirements for the principals. The program managers would discuss the plans for data collection related to program implementation and staff development. As the meeting progressed, it became apparent that there was a need for the program managers to meet regularly with the principals to solicit their feedback and engage them in discussion. The program managers had mentioned a concern that now that the evaluation was over, the program was no longer on the front-burner. The evaluator suggested that regular meetings could help the principals and the program managers maintain a sense of program coherence. The program managers then proposed that they use the meeting to solicit input from the principals about their needs and interests. At the end of this meeting, another preparatory work meeting was scheduled before the principals' coffee.

On October 9, 2003, the evaluator and the early childhood program managers met to finalize the agenda for the principals' coffee and the data collection instruments that would be used during the 2003-2004 school year. The early childhood director said that she would open the meeting by discussing the purpose of the meeting, her interest in regular meetings with the principals, and their shared responsibilities in terms of gathering and reporting data about the program. The director wanted to convey to the principals that she would use the data to help manage the program, as well as to provide reports on the program to high-level administrators. The evaluator would provide an update on the final evaluation-related activities, a brief overview of QPAS, as well as a demonstration of the online survey instrument. The curriculum resource teacher would then describe the plans for data collection in more detail. The curriculum resource teacher seemed to remain a bit uncomfortable taking the lead in discussing data collection, but she was willing to do it. The program managers planned to give the principals (total of 17) time to break into small groups to discuss the program at their schools, with a

focus on the staff development they were providing their teachers and any topics they would like to address at future meetings.

At the principals' coffee on October 17, 2003, the early childhood director began by describing the reorganization of the early childhood office and how it affected the principals. She explained that her goals for the meeting were to introduce the principals to QPAS and to the data collection activities that would be part of QPAS, specifically related to staff development and program implementation. She also explained that they would engage in discussion about their needs for future meetings. As planned, the evaluator provided a brief overview of QPAS and how it impacted principals. She also took the opportunity to update the principals on the status of the final evaluation reporting activities, and told them that she could provide a presentation of the final evaluation report at one of their subsequent meetings. After providing a QPAS overview, the evaluator described how the early childhood staff would need their assistance in capturing program implementation, since it varied across schools. She showed the principals the online survey instrument that the program managers and evaluator had created for teachers to complete, as well as the forms that principals would be asked to complete.

The curriculum resource teacher provided the principals with a draft of the goals and objectives that had been developed for QPAS purposes. One goal related to program implementation, and she explained to the principals how the surveys described by the evaluator would be used to address this goal. The other goal related to student achievement and she engaged the principals in a discussion about the appropriateness of the specific targets, and asked if they wanted the objectives to match the school system's strategic targets, when applicable. Principals indicated that they wanted consistency in goals and objectives that related to their programs. The principals explained that it would be confusing to have different expectations. The principals said they wanted the objectives to be meaningful, neither too easy nor too impossible to achieve. Throughout the meeting, the principals seemed quite willing to provide data for QPAS and other accountability purposes.

The principals were then broken into small groups to discuss the staff development activities at their schools that related to this particular initiative, as well as to discuss their needs for future meetings.

Each group then reported out to the larger group. Results from these discussions included that the principals wanted further opportunities to learn from each other about the staff development models that were being used. The principals indicated that they wanted to learn ways to induct new staff to the philosophy of this initiative. As for their needs for future meetings, the principals indicated that they wanted assistance in developing ways to easily communicate with parents about the initiative, such as a brochure. They proposed two additional meetings during this school year, one to share staff development model and the other to discuss how to promote the initiative. They also asked about inviting the Superintendent to a meeting so they could share their concerns with him. The program managers concluded the meeting by informing the principals that they would create a newsletter for the teachers in these schools to help keep the teachers informed and excited about the program.

Conclusions

The transition of this early childhood initiative from formal evaluation to documentation and review by the program managers was enabled by a combination of factors. The participatory and utilization-focused approaches taken by the evaluators throughout the course of the evaluation empowered the program managers and helped them become comfortable analyzing and discussing data about their program, as well as with accountability responsibilities. In addition, the accountability responsibilities given to program managers as part of QPAS required them to engage in evaluation-type activities. The actual transition was facilitated by active involvement by the evaluators and began before the evaluation came to a close. Once the program managers experienced some success with QPAS activities, through the practice report and the refinement of data collection instruments, they began to feel more comfortable moving forward. The principals' coffee represented a milestone for the program managers; for it was at that point that they took formal ownership of the accountability process and began engaging the principals in evaluation activities. The QPAS process will provide the program managers with information about their program that can be reported to outside audiences, as well as used to make ongoing program modifications.

Table 1

Timeline of Evaluation and Reporting Activities
Early Childhood Initiative

School Year	Phase I Schools	Phase II Schools	QPAS
1998-1999	Year 1 of evaluation		
1999-2000	Year 2 of evaluation	Year 1 of evaluation	
2000-2001	Year 3 of evaluation	Year 2 of evaluation	QPAS began
2001-2002	Final year of evaluation	Year 3 of evaluation	
2002-2003	Final report presented to School Board	Final year of evaluation	Practice report completed (covering 2000-2001 and 2001-2002 school years)
2003-2004		Final report presented to School Board	First year of documentation
2004-2005			Second year of documentation
2005-2006			First review report completed (covering 2003-2004 and 2004-2005 school years)

Note: Schools were phased into the program over time. Six schools (Phase I) began implementing the program in 1998-1999 and six additional schools (Phase II) began in 1999-2000. The evaluation looked at both phases

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